Department of Education
Office of Student Financial Assistance

Deliverable 31.2.13 Lessons Learned Analysis

August 20, 2001

Table of Contents

1. Executive Summary

Student Aid Front 2 Back is the third in a series of core curriculum courses offered by SFA University. The purpose of the course is to help SFA employees and Operating Partners gain a better understanding of the process a student goes through when applying for financial aid, the other "players" in the financial aid industry (Schools, Lenders, Guarantors) and how they interact with one another in support of the student. Additionally, SFA employees and Operating Partners will learn more about the measurements that are being used by SFA to evaluate and improve SFA's support of the student financial aid process.

A critical element of any successful training program is collecting feedback to benefit future courses. This involves gathering both the successes achieved and areas for improvement. Once Front 2 Back sessions were underway, all of the major process teams that worked on the course were invited to participate in discussions about lessons learned from their work in Front 2 Back. During these meetings, strengths and points for development were noted for each process, based upon the team's comments and observations.

This document begins with an outline of the lessons learned methodology employed for Front 2 Back. Next, the lessons learned analysis is broken down into both project-wide and individual team successes and areas for development. All lessons learned in this document are stated in terms of action statements for future training programs.

2. Lessons Learned Collection Process

Each process team was asked to complete an evaluation of their process area. In their discussions, teams facilitated and documented by Accenture team members, considered their success and points for development. The successes and points for development had to meet three criteria, which were explained by the meeting facilitator. The criteria were:

1. Lessons can be incorporated into the planning process for future course development.

This criterion ensured that the lessons were repeatable for future courses. Comments that did not generalize to training beyond Front 2 Back were not recorded.

2. Lessons come from experiences gained during Front 2 Back.

While lessons gained from other training experiences may be valuable, the scope of this analysis was limited to Front 2 Back to make the information manageable and meaningful.

3. Lessons should be prescriptive and as detailed as possible.

This criterion encouraged meeting participants not only to identify an area for development, but also to offer a detailed solution or suggestion for future training. This way, future teams will understand, in context, how to apply these suggestions.

Once the criteria were explained, the meeting participants considered their process area's strengths and points for development. Participants used the lessons learned meeting template to focus their thoughts. This template includes the three criteria and space for participants to document their thoughts.

After a few minutes of writing and contemplation, each team member shared his or her list with the other meeting participants. Each success or point for development was discussed and noted by the meeting recorder.

Once all of the lessons learned sessions were finished, the comments gathered during the sessions were reevaluated against the three criteria. Those comments that did not meet the lessons learned criteria are excluded from this document. Those that met the criteria have been included.

Over the course of the sessions, certain themes emerged from numerous process areas across the project. The next section is dedicated to profiling those comments.

3. Project-Wide Lessons Learned

During the lessons learned sessions, many comments were common to all process areas. The general comments are included below.

- Establish clear roles and responsibilities within each team.
- Create and execute a communication plan.
- Process owners should seek other's opinions but maintain decision-making power over their process area.
- Process owners should be involved in staffing their team.
- There should be a single point of contact for all external venders. (Video Producer, Graphic artist, event planner, etc)
- Key process team members must be able to attend the majority of the team meetings.

4. Individual Process Area Lessons Learned

The following section includes the results from each individual lessons learned meeting. These are further divided into groups of related lessons. To make this document constructive for the future, successes and points for development are written in the form of action statements. These statements do not reflect whether the action was a strength or weakness during the development and implementation of Front 2 Back.

Planning

Design
June 13, 2001

Design Process / Approach

- During the first meeting of the design team, the design process and methodology should be outlined by the lead instructional designer.

- Create measurable learning objectives early in the course design process.

- The design team should make all design-related decisions. To ensure a competent design, nothing that significantly affects the design of the course should be decided upon without the design team's imput.

- Members of the design team should be given materials outlining the SFA University Brand of training design and development before the design process begins.

- The design team should have a solid understanding of the course content and intended audience before designing the course.

Process Owners

- Process owners should make team staffing suggestions and work with the project manager to staff their teams. Staffing suggestions should be based upon the skill sets of available personnel, not only their availability.

- Process owners should have the authority to decide who will attend meetings concerning their process area.

- Process owners should have the authority to designate the roles of participants in meetings concerning their process area.

- Process owners and members of each team should understand the workplan and manage their team's work toward its goals.

Project Leadership Team

- A project leadership team should be created and led by the project manager. The team should include all of the individual process owners

- The project manager should have decision-making power over all course-related issues.

- The project manager should have the authority to replace members of the team that are not consistently in attendance or not performing at expected levels.

Storyboards

- A detailed course outline should be created before beginning the storyboarding process.

- Storyboarding is an effective communication technique. After the course is designed, storyboards can be valuable in ensuring that all team members and subject matter experts envision the same course outline and learning intent. They can also help the design team understand what is needed for the transitions between sections. In addition, the storyboards can be used to relate course content to key stakeholders.

- The course storyboards should be pitched to several different groups of internal stakeholders before the final pitch to leadership. This allows the presenter to become comfortable with the pitch and anticipate possible questions while also informing key individuals of general course content.

Team Composition

- A lead instructional designer should be designated responsible for the course design and given the authority to make final design decisions.

- The lead instructional designer should provide suggestions to the project manager concerning the staffing of the design team.

- The design team should consist of a small core group of designers supported by subject matter experts to advise on content issues. Use subject matter experts to ensure a solid understanding of the course content and to answer content-related questions on an as-needed basis.

- Potential design team members should be informed about the required time commitment before agreeing to participate on the team.

- The design team should include people who are not instructional designers. These participants could be taught a high-level methodology for instructional design at the beginning of the process.

- It is valuable to include a logistics expert on the design team.

- For courses that will be delivered to operating partners, an operating partner should act as a subject matter expert for the design team.

- The same individuals should comprise both the design and development teams.

Team Interaction

- During the design team kickoff meeting, ground rules should be discussed and role agreements created. This is especially important for SMEs, who will have a limited involvement in the design process.

- The lead instructional designer should be a part of the project leadership team and accountable to the project manager.

- The core design team should have decision-making power on design issues. Subject matter experts working in a consulting role should provide input for the design team to use when making their decisions.

- Design team decisions will be the basis for the work of many of the other process teams. As a result, design decisions should not be reevaluated unless there is a pressing need to do so.

Team Meetings

- Attendance at the majority of the design team sessions should be mandatory. (During Front 2 Back, problems arose when design team members were absent for long periods of time and then rejoined the group.)

Workplan

- Create and execute a detailed workplan that includes specific tasks building towards project milestones. Firm contingency plans should be produced in conjunction with the workplan.
- The lead instructional designer should help the project manager with the course workplan and project timeline.
- If the design portion of the process overruns its expected timeframe, the development timeframe should be adjusted to ensure adequate time.

Design General
- All contractors should be included on one task order. This will create clear roles, responsibilities, and accountability.
- Team members who are absent from many of the design meetings and, therefore, whose availability has changed, should be asked to become subject matter experts that advise the team.
- Subject matter experts should be asked to review the course content throughout the design process.
- Attain senior leadership authorization for conceptual models that may affect the representation of the organization.

Communications
May 29, 2001

Communication Techniques
- Establish and execute a clear and detailed communication plan.
- The communications team should establish a single point of contact responsible for sending and responding to "Sharepost" messages.
- To create interest in the course, SFA University communications should send out an initial message announcing the course four to five weeks prior to implementation. Then, another communication should be sent three weeks prior to the course to announce that the registration system is accessible.
- Communications should work with the Office of the Chief Operating Officer to draft e-mails and announcements encouraging participation in the course. The messages that are drafted should originate from the COO.

Operating Partners Communications
- To help market the course, it is helpful for SFA University communications to send electronic versions of course posters to operating partners.
- Establish a single point of contact for contact for operating partner communication.

Team Composition
- The leader of the communications team should be a part of the project team and accountable to the project manager.

Communications General
- SFAU communications should budget for unexpected production expenses. SFAU communications should expect that this budget would be needed for each course.
- Coordinate poster releases to occur on the same day for Washington D.C. and the regions.

Operating Partners
June 5, 2001

Communications
- Operating partners should receive customized messages from SFA. These separate communications should address important issues specific to operating partner involvement.
- SFA University should follow up with operating partner executives to make sure that they are communicating with their organizations.
- Establish a single point of contact from SFA to handle all communications. All communications with the operating partners should flow through that person.
- It is helpful to initially request operating partner involvement in person. The initial conversations should be followed with written communications outlining what participation is needed.
- Inform operating partners early in the process about the costs involved in course participation.

Interaction
- In the beginning of the process, set clear expectations for the level of operating partner involvement needed.
- SFA University should allow operating partners to have flexible course involvement plans. SFA University should communicate its preferences but allow operating partners to determine their level of involvement.
- An electronic copy of the course materials should be accessible to Operating Partners, enabling them to customize the course to suit their needs.
- The Operating Partner Training Workgroup members should receive an overview of the course as early in the process as possible to create interest and enthusiasm. The training workgroup should be involved in storyboard review, dress rehearsal, pilots, and implementation planning.

Operating Partner General
- If operating partners are involved in the training, SFA should consider building time into the workplan / task order to help them customize the course materials.
- The course registration system should be able to accurately track operating partner involvement.

Development

Development Process
June 19, 2001

Development General
- Course activities should be thoroughly user-tested.
- Stakeholders should be informed of the deadline for course changes after which no additional edits will be made.
- Course developers should use the same version of software and operating system.

Division of Labor
- To allow for effective knowledge sharing, SFA University employees should share responsibility for course development with contractors.
- SFA University leadership should set the expectation that SFA staff will work on course development.

Planning
- A detailed work plan should be created with specific dates and milestones included. The dates and milestones should be communicated to clients and stakeholders.
- The development timeframe should not be compressed if design overruns its allotted timeframe.
- A detailed outline should be created at the outset of course development. This allows the team members to develop the different sections of the course separately but ensures that all the different sections will be integrated.
- After the conclusion of the course pilots, determine what changes will be made to the course before printing. This provides the final documents for the Training of Trainers course.
- The materials that are used for the Training of Trainers course should be the final course materials.

Dress Rehearsal and Pilot Sessions
June 18, 2001

Dress Rehearsal Participants

- The audience for the dress rehearsal should be selected and invited well in advance of the session.

- The role of the audience during the dress rehearsal should be to provide the pilot presenters with a realistic course experience. The dress rehearsal participants should not be encouraged to critique the course design during the session, but rather to act as a typical course audience.

Dress Rehearsal General

- A dress rehearsal makes the pilot sessions seem more polished and increases the likelihood of obtaining quality feedback during the pilot.

Pilot Communications

- Both pilot participants and their managers should be contacted via e-mail with specific information requesting participation in the pilot sessions.
- A communication plan for the pilot should be created and executed.
- When recruiting potential participants for the course pilot, the first step should be to inform the organization's general managers about your need for participants. Next, managers should be contacted to ask if their staff members are available to participate in the pilot. The managers should be asked to respond by a certain date. If the manager agrees to support the participation of his / her employees, then the potential participants can be contacted directly.

Pilot Materials

- To ensure the readiness of the pilot presenters, there should be only minimal changes between the dress rehearsal and pilots.
- The course materials should not be changed between pilots. Delivering the same course material in both pilots thoroughly tests the course content and materials across various audience groups.

Pilot Participants

- To obtain a representative sample, the pilot audience should include people from different channels, operating partners, enterprise services, and regions.
- If operating partners are going to attend the course, they should be included in the pilot sessions.
- When identifying potential pilot participants, only those people who agree to stay for the entire session should be selected to participate.

Pilot Planning

- The pilot team should keep the number of course observers to a minimum. The more observers in the classroom, the less representative the training will be of an actual session.

- The tasks associated with the pilot should be scoped out far in advance of the session. This can be done effectively by creating a pilot plan that includes a list of all necessary pilot tasks, who is accountable for them, and related deadlines.
- One person should be designated to coordinate logistics for the dress rehearsal and pilots.
- Items remaining from previous courses should be utilized as giveaways during the course pilots. It is not necessary to have the giveaways and table toys that will be used for the course.

Pilot Presenters
- The presenters for the dress rehearsal and pilots should come from SFA University and present for both sessions.
- A master of ceremonies should facilitate the pilots. This person should introduce the course with the participants role and provide general instructions. At the end of the session, the master of ceremonies should facilitate a discussion of the experience.
- A backup facilitator should be designated and available to present the pilot in case of emergency.

Pilot General
- Holding one of the pilots in a regional location allows for a good audience sample and also creates enthusiasm for the course.
- Two evaluations should be used for the pilot sessions. One should be completed as the pilot is running and one after it is finished. The one given during the class should request information about each activity in the course. The evaluation delivered after the class should request information about more general course topics such as course content and delivery. Also, there should be a debriefing discussion after the course is finished to collect any other impressions or comments and to address questions related to the course rollout.

<u>Materials</u>

Video
May 31, 2001

Development Process/ Approach
- The video team should investigate whether or not SFA or another agency has produced similar videos in the past. If possible, footage from previous videos should be used in the new video to reduce costs.
- When sharing comments and changes with the video producer, it is best to do so in writing. Written changes make it easier for the director to get a clear understanding of what is needed and document what was requested.
- When producing multiple videos, it is helpful to have the final videos on one tape and in the order they will be used during the course.
- The video design process should begin when the course design process is nearing completion.
- The video company should be asked early in the process to close caption the video for the hearing impaired.
- If possible, the video should be general enough so that it can be reused outside of the course.
- Including SFA and operating partner personnel in video is of interest to the course participants.

Subject Matter Experts
- The video design team should utilize subject matter experts throughout the design process.
- When technical content is a part of the video, subject matter experts should be involved in writing the script.
- Subject matter experts and design team members should jointly review the script before the video enters production.

Task Order
- Include the video as a part of the lead contractor's task order.
- The video process owner should be involved in drafting the task order for the video.
- The task order should specify specific delivery dates that correspond to the entire project work plan.

Team Composition / Interaction
- A video design team should be accountable for the video.
- A process owner should lead the video design team and be accountable to the project manager. The process owner should have previous experience in video design and production.
- A member of the design team should be included on the video team to ensure the video's content and design is compatible with the course.
- During the first video team meeting, clear roles and responsibilities should be established.
- It is helpful to provide a single point of contact for all communications.
- The single point of contact for SFA should maintain continual contact with the video producer to ensure a quality product.

Workplan

- The producer should help create the video workplan and agree to the dates and milestones outlined within it.
- Four to five video cuts should be incorporated into the video workplan.

Video General

- Before creating a contract for a course video, the course design should assess the content being delivered and decide if video is the best instructional strategy.
- If possible, select a video company that is close to SFA's geographical location.
- Videos should be used to create a mood or illustrate a point already made in the course.
- It is helpful to have a VCR available to review cuts of the video as they become available.

Graphic Artist
May 29, 2001

Communications
- If possible, SFAU graphics software should be comparable with software used by the graphic artists. This would allow SFA University to produce more of its artwork internally.

Interaction
- All communications with the graphic artist should flow through a single point of contact. The point of contact should be familiar with the course content.
- Clearly communicate to the graphic artist the desired file format for the graphic art.
- A member of the development team should be involved in decisions on acceptance of graphics. This helps ensure integrated content and design.
- Graphic Artists should be used to produce the course logo.
- If possible, the graphic artist should handle course materials production.

Selection
- Choose graphic artists who are familiar with SFA, if possible. This reduces the initial orientation time.
- Obtain graphic artist bids as early in the process as possible. This allows for an informed and timely selection decision.

Task Order/ Request for Quotation (RFQ)
- The specifications in the RFQ should be determined after the course design process is finished.
- Whenever possible, plan for the graphic artist to be paid directly by SFA, rather than included in a contractor task order. A contingency plan should be created in the case that SFA is not able to pay for the graphic artist directly.
- Before creating the graphic artist contract, decide what can be done by internal SFAU communications.

Course Giveaways
June 5, 2001

Procurement
- Giveaways should be ordered as early as possible. Contingency plans should be created in case the items do not arrive on time.

Selection
- One person should be accountable for choosing the giveaways after key stakeholders have given their opinions.
- Giveaways should be selected when the design process is complete. This ensures that the giveaways selected match the course design and intent.
- Before starting the giveaway selection process, the number of people who will receive giveaways should be ascertained. A budget for table toys should be determined early in the course design process. Knowing the giveaway cost per person will help in selecting the items.

Specifications
- Food items should not be considered as possible giveaways.
- Table toys, which are items that can be reused for future courses, should not be imprinted.
- When reinforcing general messages that are a part of several courses (ex. service standards), do not imprint the name of the course on the giveaway.
- Giveaway items that are given to participants to take with them should receive an imprint if they are specific to one course.

Use of Giveaways
- If the course design allows, distribute one giveaway in the morning and one in the afternoon to encourage participation.

General Giveaways
- When determining the number of table toys to order, it should be assumed that these items will need to be replaced late in the course implementation. This assumption will prevent SFA University from having to reorder items.
- Reusable items should be returned to headquarters when training in each regional location is complete.

Logistics

General Logistics
June 4, 2001

Event Planning Firms
- Before hiring an event planner, SFA University should thoroughly analyze which tasks it can accomplish independently.
- The event planning contract for Front 2 Back should serve as a baseline measure for future courses. This means that future event planning contracts can be evaluated against the terms set out in Front 2 Back
- Money should be included in the SFA University operating budget for course logistics.
- SFA University should keep a list of event planners that they have used and ratings on their performance. This will provide valuable information when selecting event planners in the future.

Kit Production Team & Interaction
- The kit production lead should be given adequate resources for kit production and assembly. Approximately 3-4 full time resources are necessary to produce kits for a course as large as Front 2 Back.
- A process owner should manage the kit production and shipping plan.
- Clear roles and responsibilities should be established on the kit production team.

Kit Production Techniques
- A quality check system should be created to ensure that all of the required materials are sent to regional locations.
- There should be one shipment of materials sent to each regional location. The shipment should include all of the materials needed to complete all of the courses in the regional location.
- The logistics team should create a kit production plan that includes specific production dates.
- Baggies should be used to separate materials for different tables or sessions. (During Front 2 Back, packaging materials by table was extremely effective.)
- A detailed instructions sheet for the logistics host should be placed in each kit.
- Have the design team keep a running list of materials needed for the course. Make sure the design team is aware of the implications of its design decisions on the materials list.
- A kit list should be included in each box.

Lunch Contract
- Only caterers who can change the number of lunches needed on a day-by-day basis should be considered for a lunch contract.
- The catering contract should contain the stipulation that the caterer's service will be reevaluated every 20 days, and the contract can be canceled if the service is not adequate. During Front 2 Back, this was an effective quality assurance measure.

Lunch Implementation
- The caterer should be called one day before the training to confirm the lunch delivery.
- The logistics team should record trends in participant attendance and reduce the number of lunches ordered accordingly. (For example, during Front 2 Back a large number of "no shows" occurred on Fridays.)

Lunch Planning Considerations
- The design team should thoroughly evaluate how important the lunch is to delivering the course content before deciding to provide lunch.
- The design team should be informed what the regulations for lunch are at the beginning of the design process.
- Coffee in the morning produces a positive mood for the training.
- Ensure a single point of contact and secure budget early on to ensure coffee is provided in the morning.
- One person should take the role of an advocate for the lunches with the COTR and key stakeholders.
- The design team should create a contingency plan in case the lunch is not accepted by the COTR.

Lunch Selection
- The logistics team should check the quality of the lunch before completing the lunch contract.
- There should be a variety of choices in the lunches.
- Box lunches are cost effective and easy to handle.

Materials Shipping & Printing
- Course materials should be shipped directly from the printer to the regional locations.
- The most cost effective shipping alternative with tracking capability should be utilized.

Space Planning
- A clear decision maker should be established for determining the Training of Trainers space.
- Training of Trainers and Logistics Coordinator training should run concurrently, and therefore appropriate space should be reserved.
- The TOT design team should be given a price list for the items that they want to rent along with the Training of Trainers space. This will allow the team to design the Training of Trainers course with cost considerations in mind.
- If the Training of Trainers course is held at an offsite location, the site should be Metro accessible.

Space Procurement
- All other alternatives should be considered before booking hotel space, due to its expense.
- If the Training of Trainers space is needed during a part of the year that traditionally has heavy conference volume, it is advisable to book early.

- Meeting and sleeping rooms for Training of Trainers participants should be booked at the same hotel.
- A comprehensive document that lists all federal space available for use would be helpful when making space decisions.

Logistics General

- SFA University should try to use as many reusable items as possible. Logistics hosts should gather up all of the materials in between sessions and at the end of the course send them back to headquarters.

Logistics Coordinator Selection
June 6, 2001

Communications
- A communication plan should be created and executed for logistics coordinator selection. Communication plans ensure that worthwhile and consistent messages are sent to the organization.
- Managers and senior leadership should be informed about the importance of the logistics coordinator role and encourage participation from employees in their organization.

Logistics Coordinator Responsibilities
- Logistics Coordinators should work a minimum of 3 sessions.
- Communications to potential logistics coordinators should clearly outline the roles and responsibilities of the position.
- A conference call should be held with all of the logistics hosts to thoroughly explain their role.

Process / Approach
- A clear process owner should be designated for logistics coordinator and logistics host selection process.
- The selection process should be defined before selection begins.
- The logistics coordinator selection and the facilitator selection committee should coordinate communications, messages, and applications as much as possible.
- Every person, regardless of organization or rank, should have to go through the same selection process.
- A committee should be created to review applications and make selection decisions. (During Front 2 Back, a four-person selection team worked well.)
- Holding interviews for logistics coordinators would allow the selection committee to more completely gauge the candidate's qualifications.
- Checking the candidates' availability early in the selection process ensures that the potential logistics coordinators can fulfill the needed time commitment.
- There should be a pre-selection teleconference interview to explain responsibilities and general expectations of Logistics Coordinators and Hosts.

Selection Guidelines
- Establishing clear selection criteria at the beginning of the process makes selection decisions easier.
- An important factor to consider when making selection decisions is prior experience of the candidate in the logistics area.
- When individuals apply to be a logistics coordinator, the logistics committee should verify that the candidate can fulfill the responsibilities of the role.
- Individuals with known performance problems in their organization should not be selected as logistics coordinators.
- It is advantageous to select regional staff to be logistics hosts and logistics coordinators because of their knowledge of regional training locations. This practice also reduces travel-related costs.

Logistics Coordinator Selection Team General

- The logistics host position allows greater reusability of materials and reduces cost.
- It should be possible to apply to be a facilitator and logistics coordinator on the same application.
- Logistics coordinator coaching and shadowing increases the logistics coordinators' confidence and performance level.
- It is valuable to allow candidates to choose how they would like to be contacted with their selection decision. By including the option of being contacted via email or telephone on the application, the participant chooses the method of contact with which they are most comfortable.
- There should be a training teleconference that reiterates the roles, responsibilities, and expectations of logistics hosts.
- SFA University should encourage the participation of operating partners as logistics coordinators and logistics hosts. (During Front 2 Back, operating partners served as facilitators but not as Logistics Coordinators.)

Logistics Coordinator Training Design & Development
May 31, 2001

Design Considerations
- Logistics coordinator training should include enough time for the logistics coordinators to become familiar with each other and the facilitators.
- Logistics coordinator training should start at the same time as the Training of Trainers.
- During the course walk through, logistics coordinators should experience the training course in the same way that the course would typically be presented.
- The logistics coordinators should experience each individual task they perform during the training.
- The logistics coordinators should be given ample time to become familiar with the course materials.
- Logistics coordinators should not be taught the entire SFA University brand program. They should be taught those sections that have to do with course implementation and logistics.
- A helpful exercise for logistics coordinator training is to give the logistics coordinator a completely unorganized course kit and have them assemble it as they would for an actual course.
- The logistics coordinators should practice their tasks with actual course presenters. During logistics coordinator training, they should support the course presenters as they practice their course sections.
- The expectations and ground rules for logistics coordinators should be clearly defined during the training.
- An evaluation that measures specific learning objectives should be administered to logistics coordinators at the end of the training.

Design & Development Process
- The logistics coordinator training team should keep an up-to-date materials list.
- The course modules that will be a part of the logistics coordinator training should be available for review and revision well before the start of the program.

Materials
- The logistics coordinators should receive a course outline that includes all of the tasks that they will need to perform during each portion of the day.
- A burned compact disc including all of the course materials should be included in the logistics coordinator materials. Also, logistics coordinators should receive a hard copy of the course materials.
- The logistics coordinator training team should produce a condensed and comprehensive logistics coordinator checklist.
- A troubleshooting list should be created to help the logistics coordinators when they run into unexpected circumstances.

Task Order
- Logistics coordinator training should be built into the lead contractor's task order.

- Coaching and shadowing time for logistics coordinators should be built into the lead contractor's task order.

Team Interaction
- A clear process owner should be selected for logistics coordinator training design and development.
  Clear roles and responsibilities should be established for the team at the beginning of the process.

Facilitators

Facilitator Selection Process
June 12, 2001

Audition Feedback Form
- The feedback form used in the auditions should be thoroughly completed. The more detail that is included in the feedback form, the easier the selection decisions will be.
- Make the scale of the audition feedback form from 1 to 5 rather than 1 to 3. This allows for more differentiation among the candidates' ratings.

Auditions
- When presenter candidates arrive for an audition, a logistics coordinator should greet them as they come in.
- The selection team should make the potential presenters feel welcome when they first enter the audition.
- (During Front 2 Back, a 5-minute audition was sufficient to assess the presenter's skills and abilities.)
- During the auditions, candidates should be given minimal equipment to help them present. An overhead projector is adequate.
- During the audition process, the committee should take frequent breaks to avoid becoming too tired. (During Front 2 Back, nine auditions per day was the most the selection team allowed.)
- Auditioning all of the candidates is valuable if it is financially feasible.
- Holding a regional audition reduces cost and produces enthusiasm and interest for the course.

Communications
- The facilitator selection team and the logistics coordinator selection teams should coordinate their processes and communications. It should be possible to apply for both positions simultaneously with one application.

Facilitator Scheduling
- When scheduling selected presenters for their training sessions, it is effective to ask which dates they are not available, rather than asking them when they are available.
- To have a strong course rollout and create enthusiasm for the course, presenters with the best presentation skills and content knowledge should be scheduled for the first sessions.
- It is important to schedule a good mixture of skills for each training session. Therefore, the selection committee should try to match presenters with complementary skills.
- A backup presenter should be on call for each training session.

Facilitator Selection Process-General
- Application screening is a useful tool when dealing with a large group of applicants.
- Candidates for selection should not serve as members of the selection committee due to conflict of interest.

- Every person, regardless of organization or rank, should have to go through the same selection process.

Selection Criteria
- The selection team should agree to a set of skill criteria that are important in successful facilitators. The application and audition should evaluate the candidate by these selection criteria.
- Presenters should have strong interpersonal skills. During Front 2 Back, the candidates' interpersonal skills were assessed from the conversation between the applicant and the committee before the start of the audition.
- Presenters should be selected strictly because of the skills that they posses, not because the selection committee needs a certain number of facilitators for the course.

Selection Process/ Approach
- Clear roles and responsibilities for the members of the selection committee should be established at the beginning of the process.
- Selection process frameworks, schedules, and workplans should be created before work is started on the selection process.
- Managers should be asked about their employees' availability during the application stage of the process. Checking the candidates' availability early in the selection process ensures that the potential facilitator can fulfill the needed time commitment.
- Candidates should be contacted by phone to reveal whether or not they were selected.
- Once auditions are complete, the selection team should move to an offsite location to choose the presenters. The offsite location allows the team to be candid about applicants and their work without interruptions.
- Individuals who are not selected should receive their telephone calls first.
- After selection decisions have been communicated by phone, an e-mail should be sent out thanking all the candidates for their participation.
- If possible, a SFAU manager should make the selection phone calls.

Team Composition
- The process owner should provide suggestions to the project manager about team staffing.
- The selection committee should consist of three people.
- All members of the selection committee should have prior experience as a facilitator.

Training of Trainers (TOT) Design & Development
June 5, 2001

Communication
- The importance of consistent course delivery should be stressed during the Training of Trainers.
- It should be stressed that the role of the Training of Trainers participants is to learn how to effectively present the course content.

Design & Development Process
- Content that will be presented during the Training of Trainers course should be available to be reviewed by the team prior to the sessions.
- A dress rehearsal including all of the Training of Trainers presenters should be held to make sure that all of the different sections fit together.
- All Training of Trainers presenters should be familiar with what the rest of the presenters are going to cover. This allows the presenters to create an integrated program.

Implementation & Timing
- A master of ceremonies should oversee the entire program, providing continuity across all sections of the course.
- The logistics coordinators and presenters should begin the Training of Trainers course at the same time.
- Those people who have gone through the SFA University Brand workshop should not have to attend again.
- Presenters should have the opportunity to practice the course while interacting with one of the logistics coordinators.
- The SFA University Director and SFA COO should be asked to participate in the beginning and end of the sessions. Their involvement gives credibility to the course and increases enthusiasm among the presenters.
- The design and development team should coach facilitators on their content and presentation skills.
- Ample time should be included for the participants to practice with the course materials.
- Presenters should experience the course from a number of different perspectives. Front 2 Back presenters participated in a course walk through, a behind the scenes presentation, and then they presented the course themselves.
- If a there is a subject matter expert (SME) day, participants should be allowed to spend their time with those experts from whom they need the most information. There should not be a forced rotation from one SME to the next.

Logistics
- A logistics plan should be created near the beginning of the process.

Materials
- An emergency contact list should be distributed to course presenters.

- A running materials list should be kept during the Training of Trainers design & development.
- Service recovery procedures should be clearly outlined for facilitators. Each facilitator should be supplied with a contingency sheet.

Post Training of Trainers Follow-Up

- An email forum for presenters should be established to share information about the course after the Training of Trainers.
- Coaching and facilitator support should be provided during and after the Training of Trainers.
- Ample time for self-study should be provided between the Training of Trainers and the beginning of the course implementation.

Team Interaction

- A clear process owner should be designated for the Training of Trainers sessions.
- The process owner should possess strong presentation, project management, and instructional design skills.
- Members of the Training of Trainers design and development team should be available to meet and discuss the program throughout the process.
- Clear roles and responsibilities should be designated for the Training of Trainers team.
- Training of Trainers presenters should follow a common dress code.
- There should be one final decision maker for the Training of Trainers.
- Team members should manage their work to meet the goals established in the workplan.
- The course design and development team should be responsible for the Training of Trainers course.

Training of Trainers Course Topics

- Personal hygiene should not be discussed.
- Time should be allotted to review the course design and intent with the design and development teams. It is valuable to provide an opportunity for people to ask questions about the course design.
- A question and answer session with the design and development team should occur on one of the final training of trainers days to answer any outstanding questions.
- Only those sections of the SFA University Brand that have to do with course presentation should taught.
- Presenters should be given the opportunity to practice the tasks and responsibilities of a logistics coordinator so that they feel comfortable with all elements of the course.
- The Training of Trainers should include training on how to use the course audio/ visual equipment.
- An overview of storyboarding should be taught during the training of trainers course.
- The course storyboards should be presented during the Training of Trainers to provide an overview of the course design.

Appendices

Appendix A: Lessons Learned Template

Appendix B: Lessons Learned Meeting Schedule